

**STATE OF SOUTH CAROLINA
COUNTY OF BERKELEY**

PROBATE COURT

IN THE MATTER OF

CASE NUMBER

INVENTORY AND APPRAISEMENT

☐ ORIGINAL ____
☐ SUPPLEMENTAL # ____

Conservator: _____

Protected Person's Social Security Number: _____

The undersigned, being sworn, states: That the following schedules contain a complete and accurate inventory and appraisal of all real and personal property of this estate so far as the undersigned is informed; that he/she has estimated and appraised all listed property at its fair market value, according to the best of his/her knowledge and ability.

Copies of this inventory have been sent to the following persons.*

SWORN to before me this _____

day of _____, ____.

Signature: _____

Name: _____

Address: _____

Telephone (O) _____
(H): _____

Notary Public for South Carolina
My Commission Expires: _____

The gross fair market valuation of all assets, regardless of situs, should be given as of the date of appointment. List all out-of-state assets on appropriate schedules. A Supplemental Inventory should be utilized for correcting, adjusting or adding to an original inventory.

The type and amount of any encumbrances that may exist with reference to any item should be disclosed.

Case Number:

RECAPITULATION

	Out-of-state	In-state
Schedule A - Real Estate.	\$ _____	\$ _____
Schedule B - Stocks and Bonds.	_____	_____
Schedule C - Mortgages, Notes and Cash.	_____	_____
Schedule D - Insurance on Person's Life		
Part 1 - Payable to Estate.	_____	_____
Part 2 - Payable to Beneficiary.	_____	_____
Schedule E - Jointly Owned Property.	_____	_____
Schedule F - Other Miscellaneous.	_____	_____
Schedule G - Transfers prior to		
incapacity.	_____	_____
Schedule H - Powers of Appointment.	_____	_____
Schedule I - Annuities.	_____	_____
 TOTAL GROSS VALUE.	 \$ _____	 \$ _____
ENCUMBRANCES.	(_____)	(_____)
TOTAL NET WORTH.	\$ _____	\$ _____

*Within thirty (30) days following appointment, a copy of the inventory and appraisal shall be sent to each interested person who requests it, and the original inventory filed with the Probate Court. A copy must also be provided to the protected person, if he/she has attained the age of 14 years, and to any parent or guardian with whom the protected person resides.

NOTE: WHEN COMPLETING THE FOLLOWING SCHEDULES, PLEASE REMEMBER TO LIST ALL ASSETS, REGARDLESS OF SITUS. ALL OUT-OF-STATE ASSETS MUST BE DISCLOSED.

SCHEDULE A - Real Estate (All interest in real property except those held with right of survivorship) (If none, so state.)

(For jointly owned property with right of survivorship, see schedule E)

Item No	Description	Tax Assessor's Fair Market Value for year of Appointment	Appraised Value	Appraised Value of Protected Person's Interest
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TOTAL SCHEDULE A
(also enter under recapitulation above) \$ _____

Case Number:

SCHEDULE B - Stocks and Bonds (If none, so state.)

(For jointly owned property with right of survivorship, see schedule E)

Item No.	Description	Face Value	Appraised Value
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TOTAL SCHEDULE B
(also enter under recapitulation, page 2) \$ _____

SCHEDULE C - Mortgages, Notes and Cash (If none, so state.)

(For jointly owned property with right of survivorship, see schedule E)

Item No.	Description	Value
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TOTAL SCHEDULE C
(also enter under recapitulation, page 2) \$ _____

(If more space is required, insert tax schedules or additional sheets of same size.)

SCHEDULE D - Insurance (If none, so state.)

Part 1 - Life Insurance Payable to the Estate

Item No.	Description	Value
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TOTAL PART 1
(also enter under recapitulation, page 2) \$ _____

Case Number:

Part 2 - Life Insurance Payable to Beneficiaries

Item No.	Description	Value
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TOTAL PART 2 (also enter under recapitulation, page 2)	\$ _____
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SCHEDULE E - Jointly owned Property (with right of survivorship)
(If none, so state.)

Item No.	Description	Percentage Includible	Appraised Value of Protected Person's Interest
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TOTAL SCHEDULE E (also enter under recapitulation, page 2)	\$ _____
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(If more space is required, insert tax schedules or additional sheets of same size.)

SCHEDULE F - Miscellaneous Personal Property (tangible personal property, employment bonus or award, interest in a partnership or unincorporated business, articles or collections having either artistic or intrinsic value, etc.) (If none, so state.) (For jointly owned property with right of survivorship, see schedule E.)

Item No.	Description	Value
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TOTAL SCHEDULE F (also enter under recapitulation, page 2)	\$ _____
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Case Number:

SCHEDULE G - Transfers Prior to Incapacity (Transfers intended to take effect at death. United States Government Bonds "Payable on Death", Trust created by Incapacitated Person prior to incapacity in which income for life was retained, Power to revoke or other incidents of ownership retained, life insurance transfers, Lifetime transfers of real property in which Incapacitated Person retains a life estate or other incidents of ownership.) (If none, so state.)

Item No.	Description	Value
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TOTAL SCHEDULE G
(also enter under recapitulation, page 2) \$ _____

(If more space is required, insert tax schedules or additional sheets of same size.)

SCHEDULE H - Powers of Appointment (Property, both real and personal, over which Incapacitated Person possessed a Power of Appointment, whether Testamentary or otherwise.) (If none, so state.)

Item No.	Description	Value
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TOTAL SCHEDULE H
(also enter under recapitulation, page 2) \$ _____

SCHEDULE I - Annuities (IRA's, Keogh's, etc.) (If none, so state.)

Item No.	Description	Value
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TOTAL SCHEDULE I
(also enter under recapitulation, page 2) \$ _____

(If more space is required, insert tax schedules or additional sheets of same size.)

Case Number:
ENCUMBRANCES

Item No.	Schedule & Item Number	Description & Amount	Encumbered Thereby
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TOTAL ENCUMBRANCES
(also enter under recapitulation, page 2)

\$ _____

(If more space is required, insert tax schedules or additional sheets of same size.)